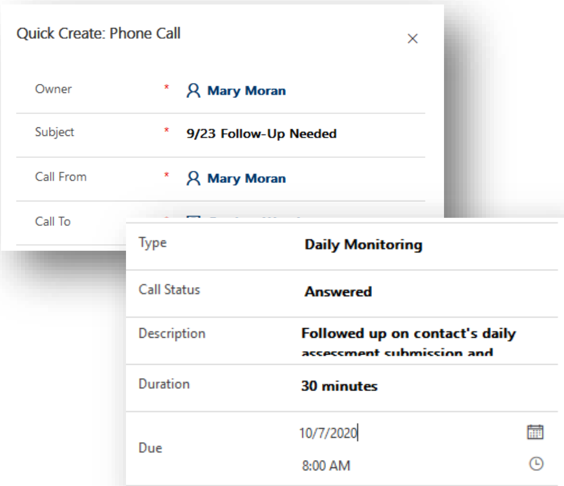
CCTO Micro-Training

Timeline/Activities: Quick Reference

Timeline/Activities helps you document and track your outreach and monitoring. See below for a broad explanation of when and how to use each type of item:

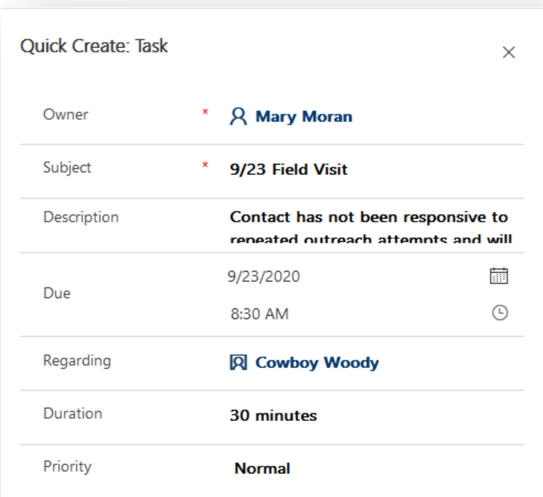
In Timeline/Activities, click +, then select…



Phone Call

… to document or schedule all attempted or successful phone outreach.

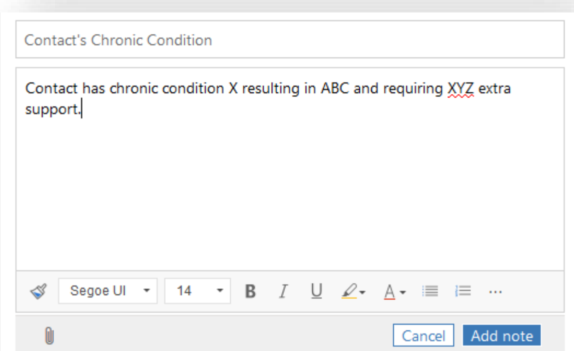
- ✓ Use "**Due Date**" to schedule in advance
- ✓ Use "**Owner**" to assign
- ✓ Follow local protocol on "Subject" and "Description," and **document Q&I referrals** per the job aid
- ✓ Use **"Call Status"** and **"Type"** to provide details
- ✓ **Must be closed** by clicking the checkmark
- ✗ **IGNORE** the "Made/Received" toggle when closing



Task

… to document or schedule all other monitoring activities, such as field visits, review of assessments, or other necessary follow-up activities.

- ✓ Use "**Due Date**" to schedule in advance
- ✓ Use "**Owner**" to assign
- ✓ Follow local protocol on "**Subject**" and "**Description**"
- ✓ **Must be closed** by clicking the checkmark



Note

… to record reference information, such as resource needs or chronic conditions.

- ✓ Record **reference information** only
- ✗ Do **NOT** use to record tasks or phone calls

Always remember to **close out your completed phone calls and tasks** by hovering over the item, clicking the checkmark, and selecting the appropriate "State" option **ONLY**.